

Isabella Nicastro

irn1@geneseo.edu | 631-896-2125 | [linkedin.com/in/isabella-nicastro-3278951a4](https://www.linkedin.com/in/isabella-nicastro-3278951a4)

EDUCATION:

State University of New York College at Geneseo

Expected: May 2024

School of Business AACSB Accredited

Bachelor of Science in Finance, Minor in Data Analytics

Cumulative GPA: 3.71 (Data Analytics Minor GPA: 3.85)

HONORS:

Scholarship from Rochester Chapter Financial Executives International (FEI) - January 2023

SUNY Geneseo Dean's List – 6 semesters (Fall 2020 – Spring 2023)

PROFESSIONAL EXPERIENCE:

Janney Montgomery Scott LLC - Garden City NY - *Finance Intern*

May 2023 – Aug. 2023

- Leveraged data analysis tools in Excel to review 500+ clients for changes in their assets & status. Updated client records in proprietary CRM software accordingly.
- Met with Financial Advisors and Private Client Support personnel to review past & present financial plans in preparation of client meetings and to grow knowledge of planning software (Thomson One).
- Took notes and participated in ~5 client meetings. Scope of meetings differed according to age and needs of clients, and included retirement planning, portfolio performance, and investment allocation discussions.
- Utilized Morningstar, F360, and Excel to conduct a comprehensive rating and performance review of mutual fund platform used to invest portfolios. Flagged underperformers for further research by investment team.
- Trusted to review promotional collateral produced by Corporate for distribution to prospective clients.

OTHER WORK EXPERIENCE:

Whales Tale - Northport NY - *Waitress*

Jun. 2022 – Present

- Served patrons in a fast-paced environment, providing exceptional customer service.
- Trusted to lead the coordination of the front and back of the restaurant during peak busy times.

CAMPUS ACTIVITIES & INVOLVEMENT:

SUNY Geneseo Student Managed Investment Fund (SMIF) – *Portfolio Manager*

Mar. 2022 – Present

- The SMIF is a long-only equity fund managing approximately \$700,000 on behalf of the Geneseo Foundation.
- Work with other members of FNCE 340 class to monitor news and market developments, make portfolio-level buy / sell and allocation (sector / size / style) decisions, and track fund performance and risk exposures.
- Help manage team of SMIF Club participants tasked with performing equity research and preparing investment recommendations on companies in the Technology & Communications sectors.

SUNY Geneseo NCAA Women's Lacrosse Team

Sept. 2020 - Present

- Manage the required 30+ hours per week along with a full course load.
- Positively impacted 2022 and 2023 team that qualified for NCAA Tournament.
- Selected by coach to represent team on Student Athlete Advisory Committee (SAAC).

Women in Business (WIB) Club - *Member*

Feb. 2022 - Present

- Participate in bi-monthly meetings to network with female business leaders and actively promote the professional development of women in business fields.

Society for Human Resource Management (SHRM) Club – *Vice Chair, Recruitment Committee*

Aug. 2022 – Present

- The SHRM Club meets bi-monthly to network with industry thought leaders and create a community of learning in the field of Human Resource Management.

Diversity, Equity, and Inclusion Committee - *Member*

Sept. 2022 - Present

- Work together with fellow students to better educate student body on how to approach DEI issues.

Student Athlete Mentor

Aug. 2022 – Present

- Selected by college administration through an interview process to become a Student Athlete Mentor.
- Coordinate 1x1 meetings to support 6 student athletes per semester in their professional and career goals.